



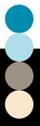
FEFCO
Corrugated Packaging

2022

ACTIVITY REPORT

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FOREWORD





Navigating challenges, achieving milestones

As the world recovers from the far-reaching impacts of the Covid-19 pandemic, this report showcases the corrugated packaging industry's ability to adapt, overcome challenges and contribute to a sustainable future.

In a tough market and energy situation, the Packaging and Packaging Waste Regulation (PPWR) emerged as a central priority of the year. The major challenge was to assert the industry positions while the complex legislative process was still ongoing. Under these circumstances, a significant milestone was pushing through the introduction of the cardboard exemption. This success underscores the industry's tenacity and its commitment to demonstrating the sustainability of corrugated cardboard. The exemption needs to be retained right through to the end of the process until it is upheld in legal text, as the industry sustains its dedication to collaborating with regulatory bodies and stakeholders for a greener future.

FEFCO's Activity Report for 2022 demonstrates the industry's resilience, showcasing a sector that continues to evolve even in the face of adversity. The decline of production volumes, the energy challenges and the complex process of influencing the PPWR remind us that difficulties are not merely obstacles but also opportunities for growth. They spur innovation, encourage cooperation and lay the groundwork for a more sustainable and robust industry.

While the global landscape remains uncertain, the many achievements described in this report together convey a resoundingly optimistic message – that through collaboration, innovation and determination, the corrugated packaging industry is resilient, and is poised to create a future that is both sustainable and profitable.

Once again, on behalf of the Secretariat, I extend our gratitude to members, associations, companies and the Board. Your passion, expertise and commitment are the pillars for FEFCO's success. Let us carry forward the spirit of unity and purpose that defines our community. Together, we will continue to collaborate, and lead, ensuring that the corrugated packaging industry remains a sustainable and profitable industry, fully embracing circular economy principles.

Eleni Despotou
Director General



2022 has been a busy year as the industry faced an existential challenge after the revision of the Packaging and Packaging Waste Directive (PPWD), which became a regulation (PPWR).

Nevertheless, as we had picked up early signals from Spain and Germany regarding reuse, FEFCO was prepared. When the regulation was published, we were ready with studies and well-researched positions.

I am very proud of the commitment of the whole FEFCO family; the Vice Presidents, Board members, Chairs of committees, our Board of Directors' members, our outstanding team and our consultants. Put simply, together we represent an excellent product that is recyclable and biodegradable, and we are reusing the same fibre in full circularity. 89% of paper packaging is made from recovered paper and the balance produced from virgin kraft paper – itself a renewable and sustainable forestry resource.

FEFCO has embarked on a decarbonisation programme, helping our members to be compliant with the legislation by 2030 and seeking all available facilities and financing from the European Union.

FEFCO fully supports the EU Green Deal objectives. But some EU proposals have taken us by surprise, being potentially highly detrimental to the environment, to our industry and the value chain. They risk destroying what is already an efficient and environmentally-friendly solution, creating logistics problems and annihilating tens of thousands of jobs in the paper and board value chain.

Our hard work to date has already been fruitful. However, it is crucial to keep up our efforts at national and regional levels, so that the proper legislation is enacted by the Council of Europe and the European Parliament. The challenge is now in the hands of our National Associations and our members.

Corrugated packaging continues to play an essential role in society – it is the packaging of the future. Our passion for our product goes hand in hand with the valuable role we represent for society.

Fady Gemayel
FEFCO President



ABOUT FEFCO

FEFCO is a pan-European association of corrugated manufacturers and represents the interests of the industry. FEFCO addresses a wide range of issues, from technical to economics, ensuring that members are continuously informed about developments that may affect the corrugated-packaging industry.

MEMBERS – BRIEF OVERVIEW

FEFCO is the European umbrella organisation of the corrugated board industry. The federation brings together 16 National Associations (active members), 21 Corresponding members (corrugated board producers in countries where there is no national association) and 175 Sympathiser members (suppliers to the industry).

Austria

Austrian Corrugated Industry Association, Austrian Paper and Cardboard Trade Association

Benelux

Corrugated Benelux Association (CBA)

Croatia

Association of Croatian Corrugated Board Producers (UHPVK)

Czech Republic

Association of Czech Corrugated Board Producers (SVVL)

Finland

Finnish Corrugated Board Association (FCBA)

France

Carton Ondulé de France (COF)

Germany

German Corrugated Board Association (VDW)

Hungary

Hungarian Federation of Corrugated Board Manufacturers (HFCBM)

Italy

Italian Group of Corrugated Cardboard Manufacturers (GIFCO)

Poland

Association of Polish Papermakers (SPP)

Portugal

National Association of Paper and Cardboard Industries (ANIPC)

Romania

Romanian Association of Corrugated Cardboard Manufacturers (ROMPAP)

Spain

Spanish Association of Manufacturers of Corrugated Cardboard Containers and Packaging (AFCO)

Sweden

Swedish Corrugated Cardboard Association (SWIF)

United Kingdom

Confederation of Paper Industries Ltd. (CPI)

CORRESPONDING MEMBERS

FEFCO has 21 Corresponding members from 16 countries. Corresponding membership is open to companies located in a country that does not have a National Association member.

In 2022, FEFCO welcomed 2 new corresponding members.

SYMPATHISER MEMBERS

FEFCO has 175 Sympathiser members from 25 countries, including 14 new members that joined us in 2022. Membership is open to companies supplying the corrugated industry.

BENEFITS AND OPPORTUNITIES

A united and credible voice

Representing the European corrugated industry before the European Union institutions and any other relevant stakeholders, to champion the interests of the industry.

Health and safety good practice

Identifying and sharing examples of good practice in the corrugated industry.

EU advocacy

Identifying and acting on EU legislation that may significantly impact the corrugated industry.

Awareness-building communication campaigns

Promoting the benefits of corrugated board as a recyclable, renewable, sustainable, bio-based product.

Market insights and news

Identifying and monitoring strategic trends that may significantly impact the corrugated industry, and disseminating information to members.

Shaping the future

Contribute to committees and workgroups that decide on key industry actions and priorities regarding EU activities, technical topics and communication.

KEY PRODUCTION STATISTICS



- Total shipments in millions of m² (including non-members) 2022
- Total number of corrugating plants (including non-members) 2022
- Average weight of board in g/m² (including non-members) 2022

KEY FACTS

CORRUGATED IN NUMBERS



Around
55 billion m²
of corrugated board is produced every year – almost enough to cover the area of Denmark.



More than
40%
of corrugated packaging is used to package food products.



Corrugated packs and protects more than
75%
of European goods.



88%
of corrugated packaging is derived from recycled content.



Corrugated board is
100% recyclable



Corrugated board is biodegradable and compostable.



Companies: around
390



Plants: around
660



Workforce: around
100,000

Corrugated cardboard – Good for society, good for the economy and good for the planet

Good for society – Corrugated cardboard packaging contributes significantly to society, employing 100,000 people directly and indirectly providing a further 270,000 jobs. Our factories and other sites are embedded in local communities, because corrugated cardboard mainly serves local markets.

Good for the economy – The industry generates approximately €25 billion a year in turnover across Europe. Much of this is ploughed back into our communities through investment in research and innovation, as well as providing a major source of national and local income through tax.

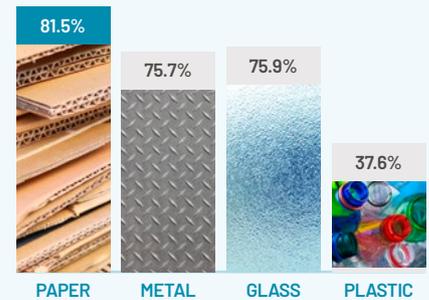
Good for the planet – Corrugated cardboard stands out as a prime example of circularity. Why? Because recycling keeps materials such as paper and board alive for a long time. The sector is a frontrunner in contributing to the EU Green Deal: the recycling rate of cardboard exceeds 90% and corrugated has an average recycled content of 89%.¹ This is a testament to the effectiveness of the well established, high performance recycling system.

Corrugated cardboard packaging is made primarily from recycled fibre coming from renewable resources, and it is biodegradable. Cardboard fibres can be recycled over 25 times,² with no significant loss in quality.

¹ www.fefco.org/sites/default/files/documents/2022/FEFCO_LCA_2022.pdf

² www.fefco.org/sites/default/files/2022/Myth_of_Limited_Fibre_Cycles.pdf

2020 Packaging recycling rate (Source EUROSTAT)



BIO BASED AND RENEWABLE

Corrugated packaging is made from natural and renewable resources. Paper and board packaging utilises an exceptional amount of recycled material, but fibres cannot be recycled indefinitely, so a steady stream of fresh fibres from sustainably managed forests will always be needed. Responsible harvesting of wood ensures long-term forest growth.

Facts:

- Between 2005 and 2020, European forest cover grew by 58,390km² – an area larger than Switzerland and equivalent to 1,500 football pitches of forest growth every day. (Two Sides analysis of FAO data, 2005-2020)
- Forests cover 40% of the European territory, with a total volume of 28 billion m³, and are growing by around 612 million m³ annually.
- 90.6% of forests owned or managed by the European pulp and paper industry are forest management certified.
- Less than three quarters of the annual growth is harvested and a net increment of over one quarter of the annual growth is added to the forest stock, every year.

Two Sides www.twosides.info/paper-packaging-the-natural-choice
CEPI sustainability.cepi.org/policy-blocks/forest/

PAPER & BOARD RECYCLING

Demand for sustainable packaging has never been greater. Paper & board packaging is not only the most recycled packaging material in Europe; it also uses an exceptionally high amount of recycled material in its production.

Paper and board are collected and recycled all over Europe. The recycled paper market relies on fibres coming from various types of packaging, with some containing virgin fibres and others being made of 100% recycled fibres. Paper and board fibres can be recycled many times, with only a small influx of virgin fibres needed to keep recycling efficient and of high quality. In addition, there's no need to transport it back to the original manufacturer.



SAFETY AND HYGIENE

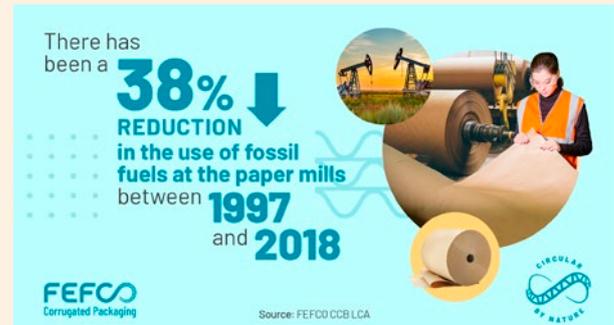
The industry continues to innovate to ensure sustainable, safe and hygienic packaging for the future. Corrugated packaging is hygienic, extends the shelf life of fruits and vegetables, and reduces food waste. Microbiological contamination of fruit and vegetables is a major concern for retailers: pathogen bacteria can put food safety at risk while spoilage bacteria impact shelf life.

During the manufacturing of corrugated, the material itself reaches at least 100°C three times during the production process, ensuring the elimination of microbes and bacteria. This greatly reduces the risk of the packaging altering or contaminating fresh produce.



REDUCED CO₂ EMISSIONS

The paper and board packaging sector plays a role in mitigating the impacts of climate change and reducing greenhouse gas emissions through carbon sequestration and improved resource efficiency.



FEFCO 2021 cradle-to-grave carbon impact was reduced to 491kg CO₂eq/t. It was calculated based on the data of the 2021 European database for Corrugated Board Life Cycle Studies.

The carbon footprint takes into account fossil and biogenic greenhouse gas emissions, and removals and emissions from land use change.

Fossil GHG emissions 669 kgCO ₂ e	Biogenic GHG emissions 442 kgCO ₂ e
GHG removals -624 kgCO ₂ e	Direct land use 4 kgCO ₂ e
Total: 491 kgCO₂e	

In addition to the quantitative results, the following points should be considered when evaluating the carbon impact of paper-based packaging.

1. All paper and board products have two unique positive attributes: they are based on a renewable raw material, using as a starting point the capacity of forests to bind CO₂; the recycling of paper and board products delays this CO₂ from returning to the atmosphere.
2. When forests are managed sustainably, carbon stocks are growing or at least stable. According to the European GHG inventory,¹ forests of the EU-28 are a net carbon sink, with net CO₂ removals by forests having increased by over 19% between 1990 and 2014.



STRATEGY AND ACTION PLAN

FEFCO is the reference voice for the corrugated industry, aiming to inform, promote and defend the industry's interests in Europe. Its target is to be ranked amongst the most credible and effective associations in Brussels, while promoting corrugated as the privileged packaging solution.

MISSION

FEFCO's mission is to promote the common interests of its members across Europe and to improve the visibility of the corrugated board industry. FEFCO provides a variety of services, useful information and technical expertise that facilitate the work of its member companies.

FEFCO ACTIVITIES

- Represent the European corrugated industry before the European institutions and any other relevant stakeholders.
- Promote the benefits of corrugated board as a recyclable, renewable, sustainable, bio-based product respecting the EU Green Deal principles and aiming to reach carbon neutrality by 2050.
- Offer expertise on policy, technical and scientific topics relevant to the corrugated cardboard industry.
- Enhance best practice in the field of health and safety.
- Serve its members by collecting and disseminating valuable information to the corrugated packaging industry and key stakeholders.
- Facilitate experience and knowledge sharing among members through the organisation of the FEFCO Technical Seminar, Summit, webinars, workshops and policy events.

There are three main criteria for successful implementation.

- Cooperation, alignment and commitment of all involved parties, notably of Board members, with special focus on National Associations and the Secretariat as well as dedicated human and financial resources.
- The FEFCO Board of Directors is composed of members having full power to make decisions.
- Establishment of an advocacy strategic plan per topic.



From a FEFCO perspective, 2022 has been a year of frenetic efforts to mitigate the potential consequences of harmful legislation. While simultaneously developing the Climate Neutrality Roadmap to demonstrate the corrugated industry's commitment to sustainability and carbon neutrality by 2050 or earlier. Corrugated cardboard is one of the best sustainable packaging solutions.

*Eleni Despotou
FEFCO Director General*

PRIORITIES AND OBJECTIVES 2022

FEFCO's main objectives specific for 2022, outlined below, were based on the strategy discussed and approved by the Board of Directors and members, and consideration of the recent EU regulatory developments, notably those related to the PPWD/R revision.

Assist member companies to maintain their competitiveness by avoiding harmful legislation, notably by:

- intensifying advocacy and communication on the Packaging and Packaging Waste Directive and Regulation (PPWD/PPWR), defending corrugated packaging
- following up on food safety legislation (chemical substances, PFAS, mineral oils, etc.)
- promoting the positions of FEFCO and Fibre Packaging Europe (FPE) on packaging solutions, to ensure a fair and level playing field.

Support member associations regarding specific advocacy issues, when relevant and requested, e.g. national and regional reuse targets, mineral oils, technical matters, promotion, etc., by:

- accompanying and supporting National Associations in their advocacy work on PPWR (and making this a top priority)
- helping them approach Member States and relevant stakeholders, sharpening the industry narrative and providing National Associations with the appropriate tools.

Guide members to comply with Green Deal requirements, notably regarding their climate neutrality journey, by:

- completing and promoting the Climate Neutrality Roadmap



- finalising a software tool to assess carbon intensity of plants, products and companies
- supporting and guiding companies to use the tool
- initiating implementation of a carbon neutral corrugated plant.

Enhance the FEFCO information and technical intelligence hub by:

- providing studies on evaluating competitive packaging materials, reuse of corrugated, biodegradability, etc.
- monitoring policies
- initiating industry statistics improvements
- collecting data for the FEFCO LCA (bi-annually)
- organising events, notably the 2022 Summit and workshops, and preparing the 2023 Technical Seminar.

Promote corrugated as a sustainable packaging solution via:

- social media campaigns
- thematic webinars for knowledge sharing
- press releases/PR outreach
- participation in conferences.





KEY ACHIEVEMENTS 2022

DELIVERING ON 2022 PRIORITIES

In 2022, most of FEFCO's resources and work focused on the industry's top priority: the Packaging and Packaging Waste Regulation (PPWR) that may negatively affect its markets and create additional financial and administrative burdens in the manufacturing processes. FEFCO published three studies in 2022 demonstrating that packaging reuse options are not always better for the environment and that corrugated cardboard is a sustainable packaging. The PPWR is part of the EU Green Deal and Circular Economy Action Plan.

The **EU Green Deal and the circular economy** have a leading role in the European Union's agenda. Given the evident impact of climate change and the ongoing energy crisis, measures related to these initiatives are vital. When discussing waste generation and management, a strong focus has been placed on the recyclability and reusability of packaging.

At European level, the debate on packaging has taken centre stage with the Commission's Packaging and Packaging Waste Regulation proposal, published on 30 November 2022.

The revision provides the EU with an opportunity to support the transition to a circular and climate neutral European economy, but it is also one of the most challenging matters for our industry today.

During the course of 2022, FEFCO actively advocated its position and organised high-level meetings and expert exchanges with the European Commission. FEFCO also encouraged its member associations and companies to be active and advocate in their countries for the same objectives.

The intensive work by FEFCO's small and efficient team, the full support from the Board members, and the support from companies' experts and the National Associations, all contributed to achieving an exceptional first victory on the legislative proposal



from the Commission, notably gaining exemptions for cardboard in key markets.

In parallel to the advocacy work, FEFCO promoted the Climate Neutrality Roadmap demonstrating the industry's commitment to take sustainability to a new level. The ambition of the industry fits perfectly with the aims of the EU Green Deal and is aligned with consumers' demand for sustainable packaging. The roadmap defines a rigorous, shared and consistent vision within the corrugated sector and its value chain. It unites the sector's ambition with international standards and Paris Agreement targets, and anticipates future regulations. Finally, it reinforces confidence regarding the sustainability of cardboard packaging.

2022 PROJECTS

To respond to the key industry challenges, FEFCO initiated two major projects that had already started in 2021 but that delivered their full potential in 2022.

- Research on single use, under the guidance and supervision of the Sustainability & Circularity workgroup (Chaired by Outi Marin, SKG). This includes three work packages: comparative LCA, hot-spot analysis and a white paper.
- Decarbonisation of corrugated packaging roadmap, led by Alex Manisty (DSS), Chair of the Climate Neutrality steering group and Communication Committee. This project required strong alignment



with policy work, technical projects and communication to maximise the results.

Together with corrugated National Associations and experts from member companies, FEFCO managed to speed up the deployment of the FEFCO plan while building on robust, fact-based elements.

EU PUBLIC AFFAIRS

In 2022, FEFCO prepared and shared with members advocacy and communication toolkits to align and facilitate the advocacy strategy and activities.

In addition, FEFCO provided practical support, information and guidance to members on key EU policies, including regular information on:

- environmental labelling legislation in Italy
- EU Fit for 55 package
- new European Climate Law
- PPWD brief
- EU deforestation legislation proposal
- Ecodesign for Sustainable Products Regulation
- overview of extended producer responsibility (EPR) systems across Europe.

FEFCO participated in several public consultations organised by the European Commission and released many position papers related to EU initiatives, including:

- FEFCO response to the European Commission's call for evidence for an impact assessment on the proposal for the revision of the EU waste framework

- FEFCO feedback to the public consultation on the Waste Framework Directive
- FEFCO response to the public consultation on food waste reduction targets.
- FEFCO feedback to the EU public consultation on the PPWR proposal.

FEFCO delivered practical and technical support to members, including on health and safety issues:

- FEFCO Code book 12th revision
- FEFCO Code of designs – A5 booklet
- publication in 2022 of the life-cycle analysis 2021 (LCA) database / Cepi ContainerBoard (CCB)
- CO₂ carbon footprint 2021
- Best practice handbook – begun in 2022 to be delivered in 2023
- Safety Alerts
- communication template with machine suppliers, to enable the sharing of information on machine-related incidents
- FEFCO safety overview.

SUCCESSFUL EVENTS

- FEFCO Summit (May 2022, Amsterdam). With 250 delegates, this event was the most attended since 2014 in London.
- The first Health & Safety Workshop on Forklift Safety, 20 June 2022 in Frankfurt.
- Technical Workshop on E-commerce, 11 October 2022 in Düsseldorf.
- In 2022, FEFCO began preparing the 2023 Technical Seminar (25-27 October, Lyon).

ONLINE COMMUNICATION AND SYNERGIES WITH NATIONAL ASSOCIATIONS

- FEFCO continued to build its network. With more than 33,000 followers on social media channels, FEFCO strengthened its position on the European institutional scene, becoming more influential on packaging-related issues.
- FEFCO enlarged its high-level followers base with key EU Commission accounts, MEPs and influential EU stakeholders.
- FEFCO campaigns related to the three scientific studies were effectively disseminated thanks to the help of corrugated National Associations. Some of them have translated the messages into national languages.

FEFCO started to promote its work on the Climate Neutrality Roadmap at the end of 2022 with a press release and articles in various EU and national media. Corrugated is already amongst the most sustainable packaging materials and the industry must ensure it remains competitive.

FEFCO regularly enriched its communication with materials from members and incorporated them into campaigns (interviews, studies, national PR activities).

STRONGER COOPERATION WITH THE VALUE CHAIN

FEFCO established close links with several organisations along the value chain and participated in alliances and coalitions with relevant associations to expand its influence and create synergies for optimum efficiency.

Please see the detailed list in the *Cooperation and network* section, page 30.



2022 PROJECTS

FEFCO STUDIES ON RECYCLING AND REUSE OF PACKAGING

In June 2022, FEFCO released three studies aiming to better understand the environmental impact of certain packaging solutions and to provide scientific evidence to support the policy discussion on the Packaging and Packaging Waste Regulation (PPWR).

The studies are:

- a peer-reviewed comparative life-cycle assessment (LCA) of reusable and recyclable packaging solutions for the food segment, carried out by Ramboll
- a hot-spot analysis of the e-commerce logistics chain, by Ramboll
- a white paper providing a critical view on packaging recycling and reuse in the European circular economy, by VTT Finland.



The results of the Recycling vs Reuse Project confirm that reuse is not a straightforward answer to deliver on the EU Green Deal. Our results show that recycling is often the best alternative, especially when transport distances increase. We continue proudly promoting our sustainable solutions.



*Outi Marin
Chair of Sustainability
& Circularity workgroup*



The peer-reviewed comparative LCA demonstrated that recyclable corrugated cardboard packaging outperforms reusable plastic crates in 10 out of 15 environmental impact categories, including climate change, resource use (fossil fuels), water use and many others.

The study also found that reusable plastic would need to complete at least 63 rotations in order to perform better than corrugated boxes on climate impact; however, the study found that the average number of reuses was 24. A sensitivity analysis was performed in the form of case studies that evaluated the environmental impact of the packaging by changing one parameter at a time across different scenarios.

The hot-spot analysis focused on the delivery of small personal items in Europe via the e-commerce supply chain. The analysis identified the critical life cycle stages, also referred to as 'hot spots', that account for most of the packaging's environmental impact.

The most important hot spot identified was the real number of uses for multiple use solutions, which proves difficult to ascertain since official data on this is

unavailable. Essentially, achieving the highest possible number of rotations is the key factor for reusable packaging to reduce its impact on the environment. A second key life cycle stage has to do with logistics parameters, such as storage and the transport distance. The complexity of e-commerce supply chains is not yet fully understood, meaning that their potential environmental impact is often higher than anticipated.



The final study of the project, the white paper, provided a comprehensive overview of the packaging recycling versus reuse debate.

Regarding the actual transition to reuse, the white paper reaffirms that changes to reuse systems involve substantial economic investments and create new costs related to return logistics, transport, washing, sorting, repair, etc. Although reusable packaging could bring value in certain applications, a complete shift to reuse could compromise current well-functioning recycling systems. If policymakers intend to favour the most sustainable option, products need to be evaluated across their life cycle on a case-by-case basis.



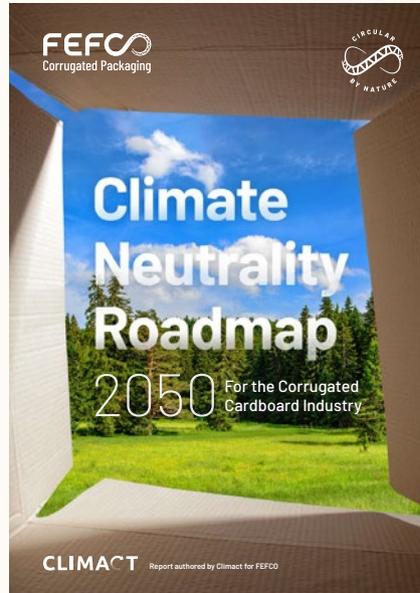
The roadmap presents a credible and feasible plan, if the whole supply chain works together, to reduce the industry's carbon footprint by 30% by 2030 and to reach net zero by 2050. Corrugated cardboard is already the most recycled packaging material, with 88% recycled content. We can create real value for customers, helping to solve their sustainability issues and make global supply chains more sustainable.



Alex Manisty, Chair of the Communications Committee and the Climate Neutrality workgroup

Why FEFCO did these studies

In the context of the revision of the Packaging and Packaging Waste Directive (PPWD), policies must encourage sustainable packaging solutions that truly contribute to waste



prevention and that are fit for purpose: both reused and recycled packaging have their role to play.

FEFCO and the industry are spreading the following messages:

- reuse and recycling are complementary
- reuse can have a higher environmental impact
- reuse can have unintended consequences: it creates complexity in the supply chain, and requires new investments in storage, washing facilities and return logistics
- all packaging should be fit for purpose.

FEFCO CLIMATE NEUTRALITY ROADMAP

A considerable amount of work has been invested in this project by all members of the Steering Committee and experts from the industry. The project is managed by a Climact consultancy team under the leadership of Alex Manisty, Chair of the ComCom and Roadmap Steering Committees.

Climact explored possible pathways to climate neutrality considering all emissions sources, including those from the value chain.

The results show that the corrugated industry could reduce its carbon footprint by 35% by 2030 through actions within our sector, and reach climate neutrality by 2050 if the paper sector reduces its (fossil) carbon footprint by 80% by 2050.

The key findings show that the corrugated cardboard industry can reduce its carbon footprint through actions directly within its control by 2050 compared to business as usual (BAU) through:

- improvements in material efficiency and circularity that would reduce the footprint by 3.3 Mt CO₂ equivalent (or 19%) by 2050 compared to BAU
- further improvements in energy efficiency and decarbonisation of the energy mix that would reduce the footprint by an additional 2.8 Mt CO₂eq (or 16%) by 2050 compared to BAU.

Looking beyond direct action, collective engagement of the wider value chain will enable corrugated cardboard to become carbon neutral and even carbon negative. Notably, the bulk of the reductions must be achieved upstream, and by reducing the carbon footprint of paper production. Reduction of the paper sector carbon footprint by 100% by 2050 (in line with the current commitment of the paper industry) would allow the corrugated cardboard



sector to even become a climate negative packaging material.

The project was finalised in 2022, and a complete set of slides and an executive summary have already been shared with members. The results were communicated online to members on 19 October 2022.

The next step of the project is to develop a software tool with company energy experts. This tool will allow FEFCO members to calculate individual carbon footprint at company and plant level, and create scenarios. The software tool can be used to respond to enquiries from stakeholders and customers. Members will be able to evaluate the results, identify impactful reduction opportunities, and develop carbon reduction trajectories to complete their journey towards net zero in an SBTi-compatible way.

SUMMIT



FEFCO welcomed 250 participants to its Summit in Amsterdam (18-20 May) with the strong involvement of the Corrugated Benelux Association (CBA). The conference programme was built around sustainability and carbon neutrality from the perspectives of policymakers, industry, NGOs and retailers.

The 2022 FEFCO Summit was the place to be to catch up on the most important topics that will drive the industry agenda. In 2022, sustainability issues were again a top priority, followed by the decarbonisation of the sector. The programme covered issues such as the Green Deal and the revision of the Packaging and Packaging Waste Directive (PPWD), as well as the



corrugated industry's pathway towards climate neutrality. The summit was also an opportunity to share ideas about the industry, global packaging trends, retail and customer expectations regarding packaging, e-commerce, and the challenges and opportunities for corrugated manufacturers.

The first results of the FEFCO Climate Neutrality Roadmap and the three scientific studies on recycled vs reusable packaging were presented for the first time. This work gives the industry a strong position in supporting the EU Green Deal. FEFCO's main objective is to enable a favourable regulatory environment and a level playing field for members to operate in. Furthermore, regulatory certainty and predictability are key to enabling the industry to innovate and effectively drive through the transformation pathway of the Green Deal.

For the first time, three panel discussions allowed the audience to actively engage with the speakers.

The first panel was about the decarbonisation of the sector. The panellists discussed the challenges and opportunities for the industry on its path to net zero and agreed that value chain players must work together to make net zero a reality.

The second debate was about how corrugated packaging can support the FMCG/retail supply chain to improve sustainability. The panellists concluded that packaging has a role to play to improve supply chain sustainability, but consumer behaviours are also part of the solution.

The last panel sparked a lively debate on the importance of supporting both single-use and reusable packaging: the industry speakers concluded that both options are needed, and the choice must be made on a case-by-case basis

FEFCO 70TH ANNIVERSARY

The 2022 Summit was the ideal moment to celebrate the Federation's 70th anniversary (1952-2022). A video showcasing FEFCO's past and presenting its future was shown at the start of the conference. The video replay is available on the FEFCO YouTube page.





COMMITTEE WORK



HEALTH & SAFETY COMMITTEE

NEW CHAIR OF THE H&S COMMITTEE

FEFCO and the committee members welcomed Sabine Nellen (Mondi) as the new Chair of the H&S Committee in February 2022, succeeding Stefan Buchner (SKG). At the end of 2022, Sabine Nellen stepped down as Chair of the committee due to a professional move.



SAFETY STATISTICS

The committee collected 2021 safety statistics and shared the FEFCO overview with the participating European companies in July 2022.

SAFETY ALERTS

FEFCO continued to share Safety Alerts provided by members. These can be found on the members section of the website.

COMMUNICATION TEMPLATE WITH MACHINE SUPPLIERS

The H&S Committee has developed a template for communication with

machine suppliers that will enable sharing of information on machine-related incidents between member companies and machine suppliers. The template was distributed to companies via the National Associations and also to the machine suppliers who are FEFCO members.

commitment of the corrugated industry to cooperate and continuously improve health and safety at production sites. An essential part of this is bringing together manufacturers and suppliers to address industry concerns and seek innovative solutions.

FORKLIFT SAFETY WORKSHOP 20 JUNE 2022

FEFCO held a workshop on 20 June in Frankfurt, focused on forklift safety. The workshop gathered together about 40 safety experts from the corrugated industry and suppliers of safety equipment. It was a thematic and very interactive gathering where participants could see and feel the new techniques and get comprehensive answers to their questions.

The event demonstrated FEFCO's dedication to safety, and the longstanding



REGULATORY AFFAIRS COMMITTEE

FEFCO PRIORITIES

Policy priorities were classified by level of importance based on their potential impact on the business and probability to occur. In 2022, the top three priorities were:

- single use and reuse with regards to the new EU Packaging and Packaging Waste Regulation
- food contact applications of corrugated
- mineral oils.

SUSTAINABILITY AND CIRCULAR ECONOMY

Packaging and Packaging Waste Regulation (PPWR)

The PPWR remains a top priority for FEFCO. FEFCO has continued to actively engage and influence the revision of this legislation.

- Published a number of joint position papers individually and in cooperation with the members of Fibre Packaging Europe. Please see the FEFCO website for access.
- Provided feedback at the European Commission workshop on 30 May 2022.



- Met with representatives from DG Environment and DG Agriculture and the respective Commission's cabinets.
- A FEFCO Vice-President participated in high-level FPE meetings with Commission cabinet members.
- Participated in meetings with representatives from the Commission's general directorates.
- Published three studies on packaging recycling versus reuse and several accompanying documents to support advocacy efforts.

The PPWR proposal was officially published on 30 November 2022 and included several exemptions for corrugated cardboard packaging from the proposed reuse targets. This success was the result of intense advocacy by FEFCO and active support from members, associations and companies. The proposal must be approved by the European Parliament and the Council of the EU in order to become an enforceable legislation. FEFCO will continue to advocate for corrugated during the negotiations at EU level and coordinate with members to mirror the activities and key messages at national level.

FEFCO studies on recycling and reuse

FEFCO finalised three studies that aimed to evaluate the environmental impact of recycled versus reused packaging. The studies were presented to members in a webinar on 15 March 2022 and published publicly on 15 June.

The studies are:

- a comparative life cycle assessment (LCA) (www.fefco.org/eu-policy/recycling-vs-reuse-packaging-project)
- a hot-spot analysis (www.fefco.org/sites/default/files/2022/FEFCO_Hotspot_analysis_study.pdf)



The Committee, together with its two sub-committees, follows the major European regulatory developments that may impact corrugated cardboard in the areas of product safety and environment/sustainability. Thanks to the professionalism of its members, the RAC was instrumental in evaluating the PPWR potential consequences for the industry and, importantly, in supporting FEFCO's advocacy. The main goal was to limit the most serious threats and to protect the corrugated board industry's interests.



Marcello Pezzi – Chair, Regulatory Affairs Committee (RAC)



- a critical review on packaging recycling and reuse (www.fefco.org/sites/default/files/files/White%20Paper_Final%20draft%20040422%20update%2015102022%281%29.pdf).

To amplify the advocacy efforts, FEFCO created an 'advocacy toolkit' for members, which included a FEFCO strategy, a master advocacy file and an outreach plan. FEFCO also issued a Q&A regarding the comparative LCA. A broad dissemination and publication of the studies was a vital means to engage with policymakers at national and EU level,

Several meetings were held with policymakers to discuss the studies and the revision of the packaging legislation and present the corrugated industry's position.

- High-level CEO meeting with the Cabinet of the Environmental Commissioner and the Cabinet of the Agriculture Commissioner.
- Meeting with the Head of Unit on waste, DG Environment, and the entire team working on the packaging waste review.
- Meeting with the food contact materials unit of DG SANTE.
- Meeting with other relevant policy stakeholders, including the European Policy Centre (EPC) and Environmental Coalition on Standards (ECOS).

Spanish Royal Decree TRIS notification

A Spanish Royal Decree on Packaging and Packaging Waste was notified to the European Commission via TRIS on 6 May 2022. The proposal sets reuse targets at national level, risking the disruption of the internal market. FEFCO initiated a coordinated action at EU level with CEPI and other associations, which submitted a joint letter alerting the Commission to the situation and asking to take action for legislative harmonisation at EU level.

Circular Economy Packages

The European Commission published a series of legislative proposals as part of its first Circular Economy Package on 30 March 2022. The most relevant proposals



for the corrugated industry were the Ecodesign for Sustainable Products Regulation (ESPR) and the Directive on empowering consumers for the green transition.

The second Circular Economy Package was published on 30 November 2022. Besides the Packaging and Packaging Waste Regulation, it also included a policy framework on biobased, biodegradable and compostable plastics. The right to repair initiative and the green claims legislation were delayed to 2023.

Ecodesign for Sustainable Products (ESPR)

The Ecodesign for Sustainable Products Regulation (ESPR), formerly referred to as the Sustainable Products Policy, aims to make sustainable products the norm and proposes rules to make goods placed on the EU market more environmentally friendly and energy efficient. FEFCO evaluated the ESPR and sent a briefing on the legislation to members, issued a press release outlining FEFCO's position and provided

feedback to the Commission's public consultation.

The Commission postponed the public consultation on which product groups to regulate via the secondary legislation to Q1/2023.

Definition of recycling

The Joint Research Centre (JRC) worked on re-evaluating the definition of recycling. FEFCO participated in a workshop hosted by the JRC in April 2022 and submitted feedback via a survey.

Revision of the Waste Framework Directive (WFD)

A revision of the WFD is scheduled to be published in Q2/2023 with a scope limited to textiles and food waste. The Commission published a call for evidence for an impact assessment on the environmental impact of waste management, to which FEFCO provided a response in May 2022.

Taxonomy

The Platform on Sustainable Finance published a report on environmental transition taxonomy and a report with recommendations on technical screening criteria for four environmental objectives of the taxonomy.

Deforestation and forest degradation

FEFCO assessed the legislation published in November 2021, and sent





a briefing to members summarising the legislation and its impact. The EU Deforestation Regulation (EUDR) applies to paper and paper products including corrugated. The Parliament adopted the Environment Committee's report on deforestation on 13 September 2022 with a widened legislative scope.

FEFCO signed several joint statements with CEPI and other associations focusing on the need to maintain a definition of 'deforestation' in line with existing international ones, and aiming to limit the administrative burden and complexity of introducing a geolocation requirement. These are available on the EU Affairs section of the FEFCO website.

Single-use Plastics Directive (SUPD)

The European Commission published a delegated act as part of the SUPD on the calculation of consumption reduction. The proposal allows Member States two methods for measuring consumption reduction of single-use plastic (SUP) products: either by the total weight of the plastic content in SUP products or by the number of SUP products placed on the market. FEFCO sent a briefing to members outlining the document and its impact on corrugated.

PRODUCT SAFETY

Food contact materials

The European Commission published its Staff Working Document evaluating Regulation No 1935/2004 on food contact materials as well as a public consultation on the 'revision of EU rules

on food contact materials', open until 11 January 2023. FEFCO prepared and submitted a response, including an updated FCM position paper.

Chemical Strategy for Sustainability

FEFCO participated in a stakeholder workshop organised by consultants Wood E&IS GmbH and Ramboll in March 2022 on the development of the 'essential use' concept. The essential use concept is a critical issue for substances and products. FEFCO provided a response to a survey after the workshop. Additionally, the Packaging Inks Joint Industry Task Force (PIJITF) presented its paper on one substance, one assessment to representatives of DG Environment in February 2022 and a follow-up meeting in May 2022. FEFCO also participated in a Commission workshop on one substance, one assessment in June 2022.

Members of the PIJITF provided input regarding chemical data and accessibility to the Commission following the meeting in June 2022 with DG Environment. The group also contributed to a public consultation from the European Commission regarding the best way for EU agencies to streamline scientific assessments of chemicals.

The revision of the Regulation on Registration, Evaluation, Authorisation and Restriction of Chemicals (REACH) has been postponed.

Mineral oils

The German Mineral Oil Ordinance was expected to be adopted in 2022, but on 16 December 2022 the German Federal Council (German Bundesrat) decided not to approve the ordinance. The ordinance could not come into force as no resolution was passed. The mineral oils issue has been discussed in Germany since 2011, with several versions proposed over time.

FEFCO worked closely with the PIJITF and approached the Commission requesting EU actions on printing inks and mineral oils to prevent national

initiatives which disturb the internal market.

France also published national legislative proposal on mineral oils. The ban covers mineral oils in inks used on packaging and would enter into force on 1 January 2023.

FEFCO and joint position papers 2022

- Joint industry statement on the revision of the Packaging and Packaging Waste legislation
- Recommendations of forest-based industries to the European Parliament – Deforestation Regulation
- Joint industry voting recommendations for the Environment Committee – Deforestation Regulation
- Joint industry letter on the Spanish Royal Decree on Packaging and Packaging Waste
- Statement of the forest-based industries on the Council draft report – Deforestation Regulation
- Feedback on the proposal for a Regulation on Ecodesign for Sustainable Products
- Feedback on the Eunomia stakeholder questionnaire – PPWD revision and recyclability requirements
- Statement of the forest-based industries on the ENVI draft report – Deforestation Regulation
- Annex proposal for amendments to the Deforestation Regulation
- Fibre Packaging Europe – How fibre based packaging contributes to the circular economy
- Fibre Packaging Europe – Fit for Purpose position paper
- Fibre Packaging Europe – Sustainable Products Initiative statement
- Fibre Packaging Europe – Single-use & Reuse position paper
- Fibre Packaging Europe – Boosting Packaging Recycling position paper
- Fibre Packaging Europe – Substantiating Green Claims position paper



COMMUNICATIONS COMMITTEE

FEFCO COMMUNICATIONS PRIORITIES

ComCom members agreed that **single use vs reuse** and the **decarbonisation of the industry** are the two essential priorities for years to come; the Committee therefore mainly focused on these priorities in 2022.

WEBINAR WITH POLITICO ON EU PACKAGING RULES



One of the first activities in alignment with ComCom priorities was a webinar with Politico on 10 May 2022: *EU's packaging rules revamp: towards a more sustainable future?* The purpose was to target key EU stakeholders and policymakers to raise awareness and disseminate the sector's position on packaging.

Reducing packaging waste is part of the Green Deal agenda to reach Europe's climate neutrality goal. The European Commission is revamping the packaging and packaging waste rules. FEFCO took the opportunity of co-hosting an event with Politico to confirm FEFCO's

commitment to the Green Deal while promoting corrugated as a renewable and recyclable packaging option.

The webinar was convened to discuss whether the expected new packaging rules would have an impact on packaging and what role recyclable packaging could play.

The Politico event attracted more participants than expected and reached high-level EU stakeholders. The conversation was very informative and served to alert participants to the Commission's plan to turn the EU's sustainable packaging rules into a regulation.

The main KPIs demonstrate the keen interest in these topics:

- 4.1k total unique viewers (all channels) with 2100 from the Politico events page
- 60 questions asked (double the average) www.politico.eu/event/eus-packaging-rules-revamp-towards-a-more-sustainable-future/
- 372K reach
- 834k+ impressions on Twitter via #revampPPWD.

The webinar is available at: www.politico.eu/event/eus-packaging-rules-revamp-towards-a-more-sustainable-future/.

RECYCLING VS REUSE PROJECT

Single-use advocacy project: dissemination to members

In coordination with the Project Steering Group (part of the Regulatory Affairs Committee), members have extracted the key results and messages of the three single use studies.

The aim was to produce easy-to-understand materials to help position corrugated cardboard packaging as a sustainable solution, particularly in the face of continued negative sentiment around single-use packaging.

On 16 June 2022, FEFCO launched its

campaign on social media: Recycling vs reuse for packaging. The communication campaign was prepared jointly by FEFCO and the communication agency.

The communication package included a FEFCO overview brochure consisting of a visual overview of the three single use studies, a press release, a set of communication materials to accompany FEFCO messages online and a calendar of social media posts.

The studies are available for download on the EU Policy section of the FEFCO website.

Dissemination of the communication materials was very effective and was key to the success of the 2022 campaign. The campaign reached its full potential thanks to the strong involvement of National Associations and FEFCO members.

The communication materials were translated into various languages and shared widely on social media channels and in the news, further adding to the success of the campaign to spread the industry's messages.

SPONSORED INDUSTRY MESSAGES AND INCREASED PR OUTREACH

The sponsorship of the Euractiv EU media portal was another component of the communication strategy. It helped support the campaign thanks to regular editorials and messages targeting the main EU stakeholders involved in the decisions about the packaging and packaging waste legislation.

Examples of opinion pieces placed in EU media:

- Euractiv portal: Towards a science-based approach in the packaging debate
- ongoing partnership with Euractiv, with regular quotes from FEFCO in articles related to the packaging and packaging waste legislation
- European Files 21 November 2022: Bringing science to the packaging

debate. The article was distributed to 5000 policymakers including the EU Commission and MEPs.

CLIMATE NEUTRALITY ROADMAP PROJECT

The Green Deal aims to facilitate the digital and green transitions. Paving the way towards the decarbonisation of the corrugated cardboard industry is one of FEFCO's top priorities.

In a context where consumer awareness and expectations for packaging are rising, and where climate change is becoming a major concern, FEFCO presented the first corrugated cardboard sector's plan to achieve carbon neutrality by the year 2050.

This impressive new ambition reflects the industry's continuous efforts to preserve the environment and reduce greenhouse gas emissions (GHGs), and contributes to the EU Green Deal goal to cut GHG emissions by 80-95% by 2050.

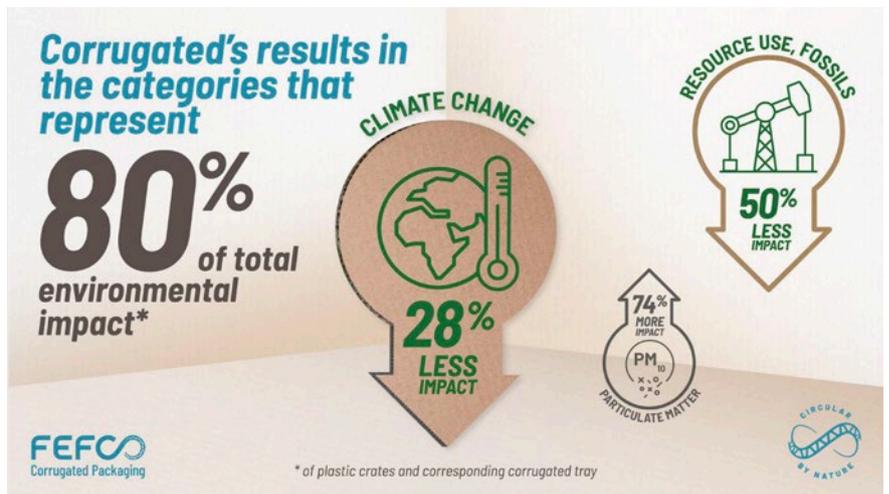
The first results of FEFCO's Climate Neutrality Roadmap were presented at the FEFCO Summit in May 2022 and the final document was launched on 29 November 2022 just before the Packaging and Packaging Waste Regulation (PPWR).

The press release and the Climate Neutrality Roadmap report are available on the FEFCO website.

The next step for 2023 will be to develop a set of visuals and communication materials for dissemination to wider audiences, including:

- a visual overview with the key pathways and summary of the results presented in a colourful and appealing way
- a set of communication materials and visuals for use in social media and news channels.

The communication on this topic that started in 2022 should continue in the coming years. Many large FEFCO members already have their own



roadmap; this FEFCO project will allow all companies to develop their own projects.

FEFCO MAIN SOCIAL MEDIA ACTIVITIES 2022

- New visuals promoting the benefits of corrugated
- New Recycling vs Reuse campaign since June 2022
- Strong PR outreach promoting the three single use studies and targeting the EU media in Brussels
- Recycling posts to encourage everyone to recycle, Do's & Don'ts and special posts on the Global Recycling Day
- Reuse of corrugated fibres (25 times reuse)
- Promoting key days: World Food Day, World Ocean Day, World Day for Health and Safety at Work
- E-commerce and fit-for-purpose packaging
- Promotion of the Fibre Packaging

Europe (FPE) coalition activities

- Live tweets at events: Politico event, FEFCO Summit, Forklift Safety workshop

KEY STATISTICS - 2022 CAMPAIGN (END NOVEMBER 2022)

- 33,250 followers: +30% all channels
- +30% visits to the FEFCO X (formerly Twitter) profile (up to 30,000 visits)
- 1,180 posts (Jan-Nov 2022)
- 26.9 million impressions (post visibility)
- 41,300 engagements = audience interaction, likes, shares, mention, clicks...
- +28% post engagement on average

Communicating to FEFCO members

- FEFCO EU monitoring - weekly or monthly
- FEFCO press clippings - monthly. This is sent by email and monitors paper and board packaging and retail developments.



- FEFCO website, updated with the latest news, events and blog posts. 285,000 page views on fefcc.org in 2022.
- FEFCO published two printed FEFCOLink newsletters, in May and November 2022. They were inserted into the International Paper Board Industry magazine, published by Brunton.
- FEFCO organised three webinars in 2022:
 - presenting the three completed studies that aimed to evaluate the environmental impact of recycled vs reusable packaging (15 March 2022)
 - sharing the updated FEFCO Code of designs (30 March 2022)
 - launching the FEFCO Carbon Neutrality Roadmap (19 October 2022).

COMMUNICATING TO THE TRADE PRESS AND MEDIA

In addition to its digital communication, FEFCO conducts traditional media activities and regularly issues press releases, available on the website. These help FEFCO to generate more exposure in the trade and packaging press.

Courants et tendances pour l'industrie papetière européenne

JACLINE OUELLET | 26 JUILLET 2022



Récemment la Fédération européenne des fabricants de carton ondulé (FEFCO) et le Cepi Container Board (CCB) ont lancé leur plus récente étude sur le Cycle de vie du carton ondulé européen pour 2021.

FEFCO et le CCB colligent des données sur le cycle de vie depuis 25 ans et les informations représentent 84% de la production annuelle de carton ondulé et de carton cannelure semi-canalé, 74% de la production de carton ondulé et de carton cannelure, ainsi que 73% de la production totale de carton ondulé.

Parmi les données clés, mentionnons que 88% du contenu recyclé a été utilisé dans la production de nouveau emballage en carton ondulé. On remarque aussi une réduction de la consommation de bois de 18%, une réduction de 4% de la consommation de papier réusé, une baisse de 28% des émissions de consommation en combustibles fossiles de l'ordre de 5%, la réduction de 28% des émissions de consommation en combustibles fossiles de l'ordre de 5%, la réduction de 28% des émissions de consommation en combustibles fossiles de l'ordre de 5%, la réduction de 28% des émissions de consommation en combustibles fossiles de l'ordre de 5%.

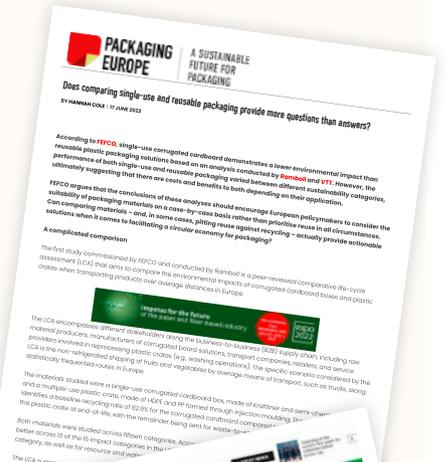
Nous sur les sites de production et une baisse de 33% des émissions de CO₂. L'Europe est le deuxième plus important fabricant de pâtes et papiers au monde après la région Asie-Pacifique. En constante augmentation depuis 2015, la capacité de production en Europe a reculé en 2020-2021 suite à la pandémie de COVID-19. Cependant, 2022 laisse présager non seulement d'une augmentation de capacité sur les sites de production de 2020 et 2021 mais aussi sur le niveau de 2007 qui oscillait autour de 144 millions de tonnes/année.

Communicating to the trade press and media

The PR outreach in the traditional media was a good complement to the intense social media activities and it generated good exposure and coverage of FEFCO's work. The three scientific studies triggered the attention of the media. FEFCO and its members actively disseminated the press materials to reach a broad audience, including the relevant policymakers, with the aim that the scientific evidence could contribute to the development of the coming legislative proposal.

FEFCO press releases 2022

- FEFCO launches the 12th Edition of the FEFCO Code
- Eco-design for sustainable products
- FEFCO summit Fit for the Future
- Three scientific studies break stereotypes on reusable packaging
- New Corrugated Life Cycle Analysis (LCA)
- New Corrugated Industry CO₂ Footprint
- The corrugated cardboard industry presents its ambition for Climate Neutrality by 2050
- Recycling & reuse recognised as complementary to the circular economy



Bringing science to the packaging debate



ELENA DESPOTOU
FEFCO's Director General

The peer-reviewed comparative LCA demonstrated that recyclable corrugated plastic crates in 10 out of 15 environmental impact categories, including climate change, resource use (fossil), water use, and many others.

The study also found that reusable plastic crates should be used at least 63 times to most environmentally friendly than corrugated cardboard – which implies continuous, especially high given that the baseline scenario is considered by the LCA, based on the best return rate of 26 times for reusable plastic crates. Additionally, these reusable packaging solutions are subject to breakage and loss, it is important to consider the number of rotations that can be achieved.



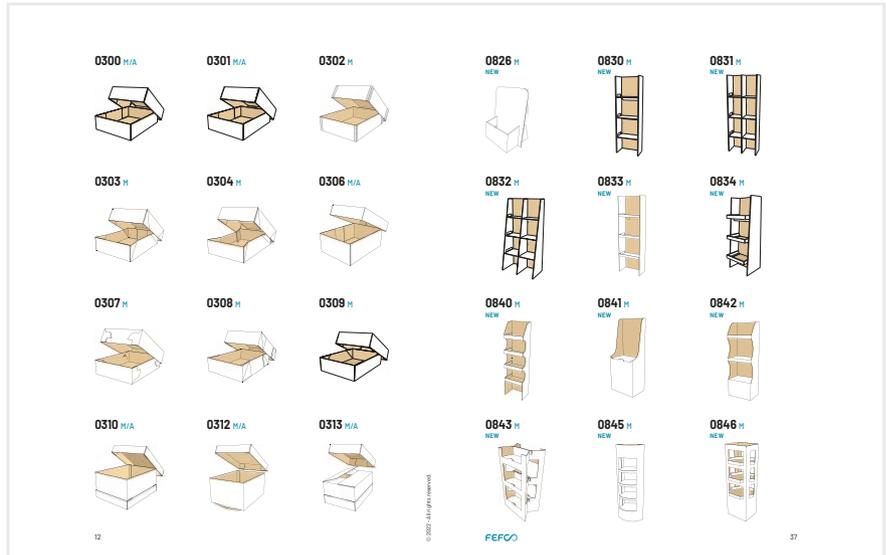
OPERATIONS & INNOVATION COMMITTEE



2022 was a challenging year for our operations due to the drop in demand for corrugated, disruption in the supply chain as well as the potential huge challenges we face with the upcoming new legislation. Nevertheless, our industry is agile, flexible and dynamic and is also able to switch challenges and threats into opportunities. The OIC contributed to the development of the Roadmap towards climate neutrality. To be able to put this Roadmap into practice, the OIC will launch the Best Practice Handbook on Energy Efficiency. By implementing these best practices, the corrugated industry will be ready to face the ambitious goal to be climate neutral in due time. Furthermore, the OIC has prepared the Fefco Technical Seminar. The focus of this well-known and successful event will be on energy reduction, sustainability and innovations to make our industry ready for the next decades.



Marc Van Damme –
Chair, Operations and
Innovation Committee
(OIC)



FEFCO CODE BOOK REVISION

The FEFCO Code was printed in 2022. Copies are available for members on request. The Code is also available as an interactive document, with an overview page for each series highlighting the new codes. All design details have been standardised throughout the book.

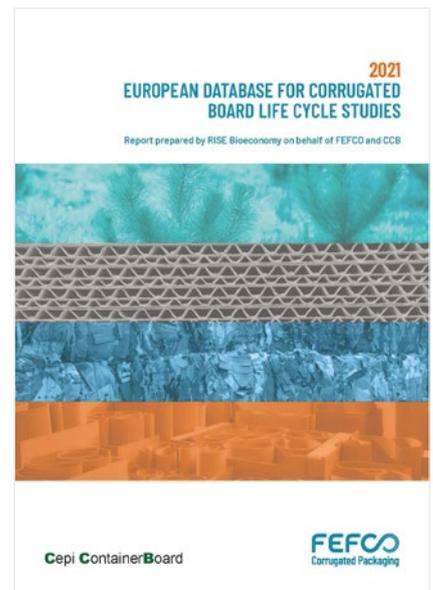
FEFCO CODE BOOK – A5 BOOKLET

FEFCO prepared an A5 booklet of the FEFCO Code to further support its members and the communication in the supply chain. The booklet contains overview pages with all designs per chapter. The booklet is available for members, in print or as a printable download, in the members areas of the FEFCO website.

LCA 2021 PUBLISHED IN 2022

The LCA 2021 report and Excel files of the data are available in a dedicated mini site: www.fefco.org/lca

FEFCO and CCB agreed to update the



LCA database bi-annually. The next revision will be in 2023 based on 2022 data.

CARBON FOOTPRINT 2021

FEFCO announced the new CO₂ footprint for corrugated board of 491kg CO₂ equivalent/tonne – a significant improvement of 7.5% compared to the 531kg CO₂e/t in the 2018 assessment. This result reflects the continuous



efforts made by the European corrugated industry and its paper suppliers to reduce their impact on the environment.

BEST PRACTICE HANDBOOK

The Operations & Innovation Committee has initiated a project as a follow-up on the implementation of the FEFCO Climate Neutrality Roadmap. The aim is to provide support and practical guidelines for the corrugated companies and plants. The project will elaborate and develop a Best Practice Handbook on energy efficiency for the corrugated plants. The handbook will be presented at the FEFCO Technical Seminar in October 2023.

E-COMMERCE WORKSHOP

FEFCO held a technical workshop on 11 October 2022 in Düsseldorf to discuss recent developments and opportunities for corrugated board packaging in e-commerce, a popular topic for the industry. E-commerce has contributed strongly to the industry's resilience. The workshop was a very successful event, attended by 140 participants. It combined technical knowledge and networking opportunities with hands-on learning that participants can use back at the plant.

FEFCO TECHNICAL SEMINAR 2023

During 2022, OIC members began to prepare the 2023 event and to draft the programme. Stand booking started in November 2022 and delegate registration in January 2023. The event takes place on 25–27 October 2023 in Lyon, France.



NATIONAL DIRECTORS COMMITTEE (NDC)



National Associations made significant efforts to advocate for PPWR. This demonstrated the ability to build a network of key policy stakeholders, this has been instrumental in advocating for the corrugated cardboard industry in the context of PPWR. Such an effective network can definitely be of great support to the continuous industry efforts. In 2022, the National Associations showed their involvement and demonstrated their value. For me, as Chair of the NDC, it was a pleasure to work with this motivated group of National Directors and the FEFCO team.



*Peter van Ostaïjen
(Corrugated Benelux
Association CBA), Chair,
NDC Committee.*

The NDC members agreed on the 2022 strategy and approved the following priorities to support FEFCO work a especially on PPWR:

- Health and safety
- PPWR advocacy
- Marketing and communication

In addition, the National Associations were very active on issues such as labelling, mineral oils and PFAS, as well as improving the corrugated industry statistics.

HEALTH AND SAFETY: INFORMATION SHARING

The National Associations share Safety Alerts with their members; the aim is to spread information on accidents by means of alerts to raise awareness and improve safety on sites throughout Europe.

ADVOCACY: PPWD/R

NDC members agreed to mirror the advocacy campaign at national level, with FEFCO supporting the NDC with all materials developed for the EU-level campaign. NDC members created a list/mapping of the key EU stakeholders at national level on the PPWD file and Circular Economy Action Plan. NDC members initiated many contacts with the key stakeholders and organised many meetings with them in 2022.

MARKETING AND COMMUNICATION

The National Associations also aligned their communications with FEFCO's communication strategy.

Campaign dissemination continued via FEFCO and the National Associations' social media channels.

All communication materials such as visuals and videos were shared, and some countries, including Spain and France, for example, translated them into local languages. They effectively contributed to supporting the industry advocacy work.

2022 CHANGES IN NATIONAL ASSOCIATIONS

Sweden

In 2022, the NDC welcomed Eva Glückman, representing SWIF Services AB, as a member of the National Directors Committee (NDC), and thanked Pernilla Enebrink, who held the position until July 2022.

Hungary and Romania

Anastassios Panayotopoulos, representing HFCEM (Hungary) and Rompap (Romania), left the FEFCO Board of Directors and the National Directors Committee (NDC) following a change of his function. FEFCO thanked Anastassios for his support over the years.

OMÜD resignation

The Turkish association, OMÜD, has resigned from FEFCO but looks forward to rejoining once the association's financial situation is normalised.





WHO'S WHO

FEFCO GOVERNANCE

FEFCO BOARD OF DIRECTORS

The Board of Directors is composed of at least 5 and at most 25 members, including the President of the Association (listed on page 29).

FEFCO EXECUTIVE BOARD

The Executive Board is composed of the President, two Vice Presidents and an Honorary Vice President.



PRESIDENT
FADY GEMAYEL



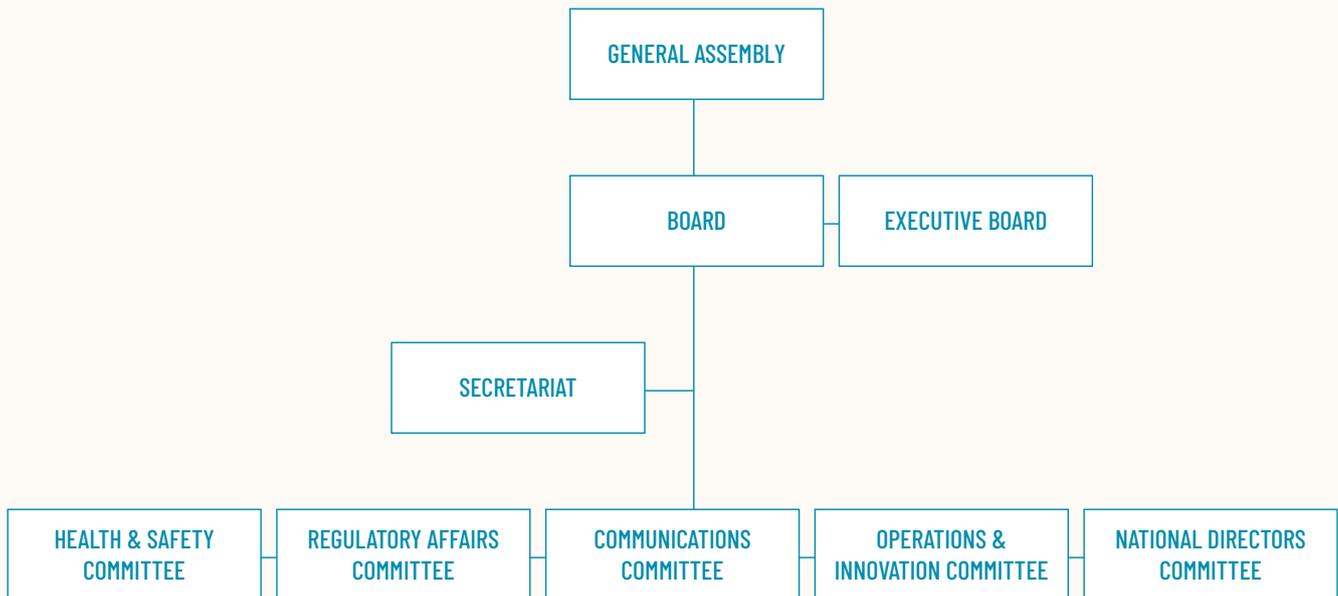
VICE PRESIDENT
SAVERIO MAYER



VICE PRESIDENT
JAN KLINGELE



HONORARY VICE PRESIDENT
NINA IVERSEN



FEFCO BOARD OF DIRECTORS 2022

EXECUTIVE BOARD

Fady Gemayel President
Saverio Mayer Vice President
Jan Klingele..... Vice President
Nina Iversen Honorary Vice President

MAJOR COMPANIES

Eric Chartrain International Paper Europe
Alex Manisty DS Smith Packaging
Saverio Mayer Smurfit Kappa Europe
Armand Schoonbrood... Mondi Packaging Europe

ASSOCIATIONS

Philippe Durand France (Carton Ondulé de France)
Steffen Würth..... Germany (VDW)
Fausto Ferretti Italy (GIFCO)
Pawel Rogalka Poland (SPP)
Leopoldo Santorroman
Saldana Spain (AFCO) - Portugal (ANIPC)
Chris Murray UK (CPI)

REPRESENTATIVES OF CLUSTERS

Miklós Rasovszky Hungary (HFCBM, Romania (ARFCO)
Nina Iversen Finland (FCBA), Sweden (SWIF)
Dirk Ockerman..... Netherlands, Belgium (CBA)
Alexander Enzenberg.... Austria (Forum Wellpapper and
PPV), Croatia (UHPVK), Czech Rep
(SVVL), Switzerland (VSW)

FEFCO SECRETARIAT

The day-to-day work of the association is carried out by the secretariat and managed by the Director General.



DIRECTOR GENERAL
ELENI DESPOTOU



**COMMUNICATIONS DIRECTOR
(DEPUTY DIRECTOR GENERAL)**
NATHALIE SCHNEEGANS



TECHNICAL DIRECTOR
KRASSIMIRA KAZASHKA-
HRISTOZOVA



PROJECT MANAGER
HOURIET LEFEBVRE



OFFICE MANAGER
JOHANNA KLOECK



EU PUBLIC AFFAIRS OFFICER
HANA GALLEGO



FEFCO ACCOUNTANT
ROSI DIMITROVA



FEFCO PARTNERSHIPS

COOPERATION AND NETWORK



all matters of common interest, notably the Ecodesign for Sustainable Products Regulation, Deforestation Regulation, food contact materials and others.

ECMA – European Carton Makers Association

ECMA brings together folding carton converters, cartonboard mills, national associations and suppliers to the folding carton industry. FEFCO cooperated with ECMA as part of the Fibre Packaging Europe coalition.



FIBRE BOX ASSOCIATION

FBA (Fibre Box Association)

FBA is a trade association that represents North American corrugated packaging manufacturers and strives to grow, protect and enhance the overall welfare of the industry through member-valued programmes and services.

FBA has worked in close cooperation with FEFCO to harmonise the US and European common footprint quality (CFQ) standards for corrugated food trays.

FBA also endorsed the FEFCO Code of designs (previously known as the International Fibreboard Case Code).

INDUSTRY COOPERATION AND EU NETWORK

FEFCO has established close links with organisations in the paper and board value chain and other packaging associations. We cooperate with other industry associations on matters of common interest where experience and knowledge are exchanged and joint actions are taken, where appropriate.

Cepi ContainerBoard CCB (CEPI ContainerBoard)

CCB is a European industry association of producers of corrugated case materials, also called containerboard. Activities are focused on primary-fibre materials (kraft liner, semi-chemical fluting) and recycled-fibre containerboard (e.g., testliner). Members represent a total European production capacity of more than 25 million tonnes of corrugated case materials.

PARTNER ASSOCIATIONS

CEPI – Confederation of European Paper Industries

Cepi is the European association representing the paper industry. In 2022, FEFCO and Cepi collaborated closely on



Maria Graça Carvalho
MEP



Jori Ringman
CEPI



Fibre Packaging Europe (FPE)



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FPE is an informal coalition of seven trade associations representing industries involved in forestry, pulp, cardboard (paper, board and carton packaging) production, and recycling in Europe, coming together to speak with one voice on the policy issues central to the fibre packaging value chain in the EU. The fibre-based packaging industry is a key contributor to the European Green Deal's aspiration to build a strong, circular and resource-efficient European economy. FEFCO is an FPE member actively collaborating with other associations on key files such as the Packaging and Packaging Waste Regulation (PPWR).

PIJITF (Packaging Inks Joint Industry Task Force)

FEFCO has chaired the PIJITF workgroup since 2020. PIJITF represents the members of the food packaging supply chain that are concerned with the application of printing inks onto food contact materials. The workgroup discusses what is needed from each level of the value chain to ensure that the final packed food product placed on supermarket shelves is safe for consumers.

Packaging Chain Forum (PCF)

FEFCO is a member of PCF, which represents the packaging value chain. It is led by European trade associations and companies representing or dealing with packaging and environmental issues across different materials and sectors. As part of the coalition, FEFCO co-signed a joint position on the Packaging and Packaging Waste Directive addressing issues of joint interest.

CSG – Cross Sector Group on food contact

The CSG on food contact represents a broad group of stakeholders, with members of the whole supply chain that are concerned with applications

of food contact materials. Typical activities relate to providing science-based guidelines for consumer safety, defending the safety of food contact materials, promoting the efforts of the supply chain and improving trust and transparency.



ICCA (International Corrugated Case Association)

FEFCO is a member of ICCA, a platform for worldwide networking of corrugated associations. The association disseminates worldwide statistics on corrugated. ICCA's services support and enhance its members' work, and contribute to the welfare of the corrugated packaging industry worldwide.

Cross-industry platform on the EU chemicals strategy for sustainability

Representing several industry sectors and under the lead of the European Chemical Industry Council (Cefic), this is a cross-industry platform giving voice to its members, to collaborate on addressing topics relevant to the EU chemicals strategy for sustainability. FEFCO is a member and cooperates closely with other associations on this topic.

CheMI (European Platform for Chemicals Using Manufacturing Industries)

CheMI, led by the European printing industry association Intergraf, is a platform for downstream users of chemicals in manufacturing industries. It works as a channel for the downstream users in articles-producing industries, to represent their interests, and aims at contributing to the successful implementation of REACH. CheMI was established in 2003. Its members are trade associations representing a variety of sectors, including FEFCO.

JOINT ACTIVITIES AND COALITIONS

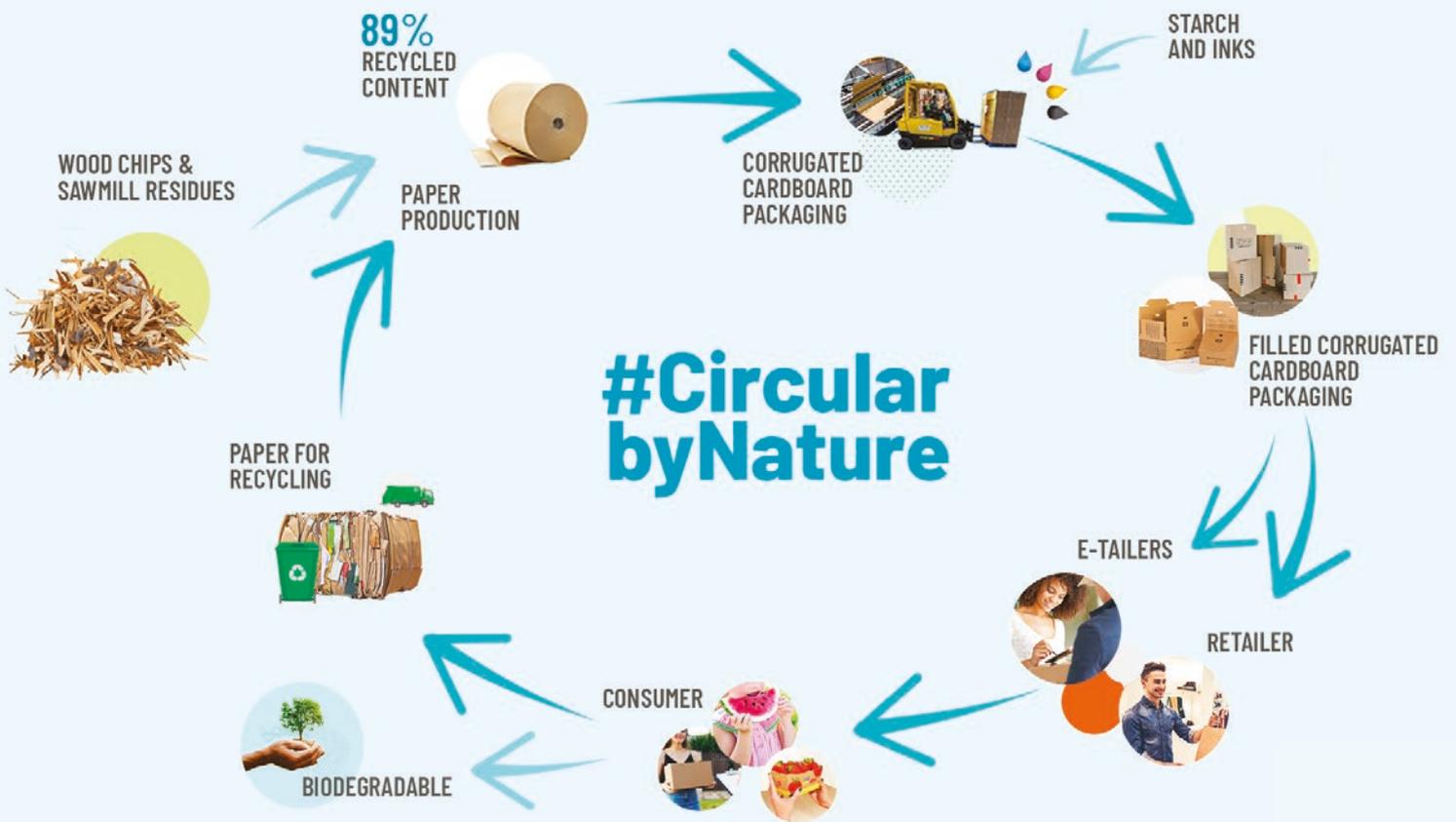


CITPA (International Confederation of Paper and Board Converters in Europe)

CITPA represent the interests of the European paper and board converting industry. FEFCO is a longstanding member of CITPA and continues to meet and exchange with its fellow association on a regular basis. CITPA also develops joint positions on numerous topics which include environmental and product safety matters to defend the interests of the paper and board converters in Europe.



CORRUGATED CARDBOARD A SUSTAINABLE CHOICE



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Corrugated Packaging



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